

INSTRUCTIONS: GUARDIAN'S REPORT

The Report Period: If this is the first Report, the report period starts on the date the judge signed the Order Appointing a Guardian and/or Conservator. If this is not the first Report, the report period starts on the closing date of the last Report. If this is an Annual Report, the report period ends one year from the start date. If this is a Report Upon Discharge, the report period ends on the date you fill out the Report.

STEP 1: GET THE NECESSARY HEALTH CARE REPORTS

Physician's Report to Guardian: Get this report from the ward's physician.

Evaluation Report: If you have inpatient mental health care authority, get this report from a psychologist or psychiatrist, as described in the Order to Guardian and/or Conservator.

STEP 2: FILL OUT THE GUARDIAN'S REPORT

- (1) Enter your name, address, and phone number.
- (2) Enter the ward's name, and check the box indicating whether they are an adult or a minor.
- (3) Enter the case number as it appears on the Petition that started this case.
- (4) If this is an Annual Report, check the box.
- (5) If this is an Annual Report and the hearing to review it is on the non-appearance calendar, check the box.
- (6) If this is a Report Upon Discharge, check the box.
- (7) If this is an Annual Report, enter the date, time, and division of the hearing as they appear on the Order Appointing a Guardian and/or Conservator or other court order setting the hearing.
- (8) Enter the report period start and end dates.
- (9) Enter the ward's age, birthdate, and, for a minor, the year the minor will turn 18.
- (10) Enter your name, phone number, and address. Check the box indicating whether the guardian has been charged with or convicted of a criminal offense, other than a civil traffic violation, during the report period. If you check "True", enter the charge, court, and case number.
- (11) Check the box indicating whether the information about where the ward lives changed during the report period.
- (12) If the information about where the ward lives changed during the report period, 1) enter the ward's address and phone number, 2) if the ward lives in a private home, enter the name of the person the ward lives with, and 3) if the ward lives in a care facility, enter the facility's name, the type of facility (boarding home, nursing home, etc.), the name of the person in charge of the facility, and the facility's address.
- (13) If the ward received services from a government agency, enter the agency's name and the name of the person responsible for the ward's affairs, and summarize the services.
- (14) Enter the name and address of each person listed on the Petition for Guardianship and/or Conservatorship under "People Entitled to Notice". If any person listed can't be found, enter that person's last address listed in the court file. If that person has no address in the court file, do not list that person. Also enter the name and address of 1) any conservator other than you and 2) any court-appointed attorney of the ward.
- (15) Enter the number of times you have seen the ward in the last 12 months and the date you last saw the ward.
- (16) Enter the name and address of the ward's physician and the date a physician last saw the ward.
- (17) If you have inpatient mental health care authority, check the box and enter the date it expires.
- (18) Enter any major changes in the ward's physical or mental condition during the report period. Enter why you think the guardianship should continue or change.
- (19) Enter anything else you want the court to know.
- (20) Date and sign.